



# OPENGOV TRAINING – CONTRACT LISTING

By: Business Improvement & Performance Office  
Veronica Schornack

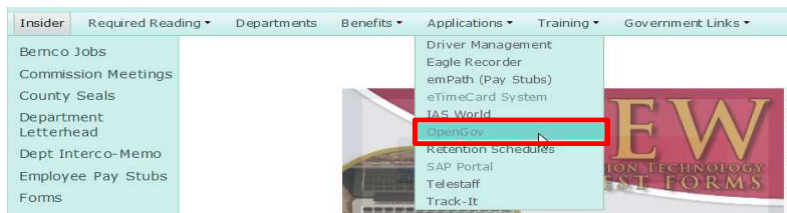
# AGENDA

- OpenGov Login
- Customize Homepage
- Dashboards Navigation
- Stories Navigation
- Contract Listing Navigation
- Report Navigation

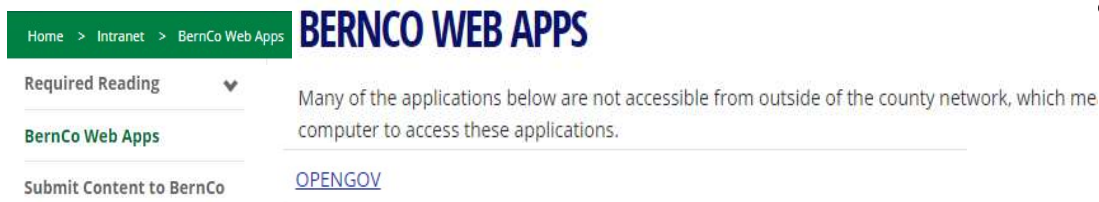
# OPENGOV LOGIN

## Internal Access

- To access OpenGov, navigate from BC Insider -> Applications -> OpenGov:



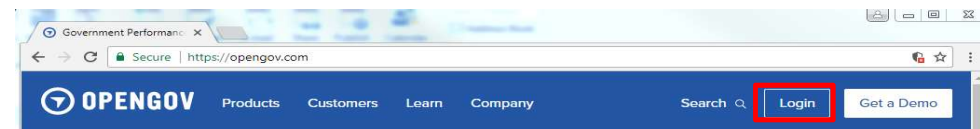
- To access OpenGov, navigate from Bernco Connect-> Bernco Web Apps -> OpenGov:



## External Access

- OpenGov is internet based and can be accessed from anywhere

- Go to <https://opengov.com/> and click Login in the top right hand corner



- To directly access OpenGov Reports, click the link below

- OpenGov Reports (login required): <https://controlpanel.opengov.com>

# OPENGOV LOGIN CONT.

- Login using Bernco email address
- If you need your password reset, click on 'Forgot your password?'
- For additional help logging in or requesting new user access contact Business Improvement & Performance Office, contact information on the last slide



Email

mzuniga@bernco.gov

Password

●●●●●●●●

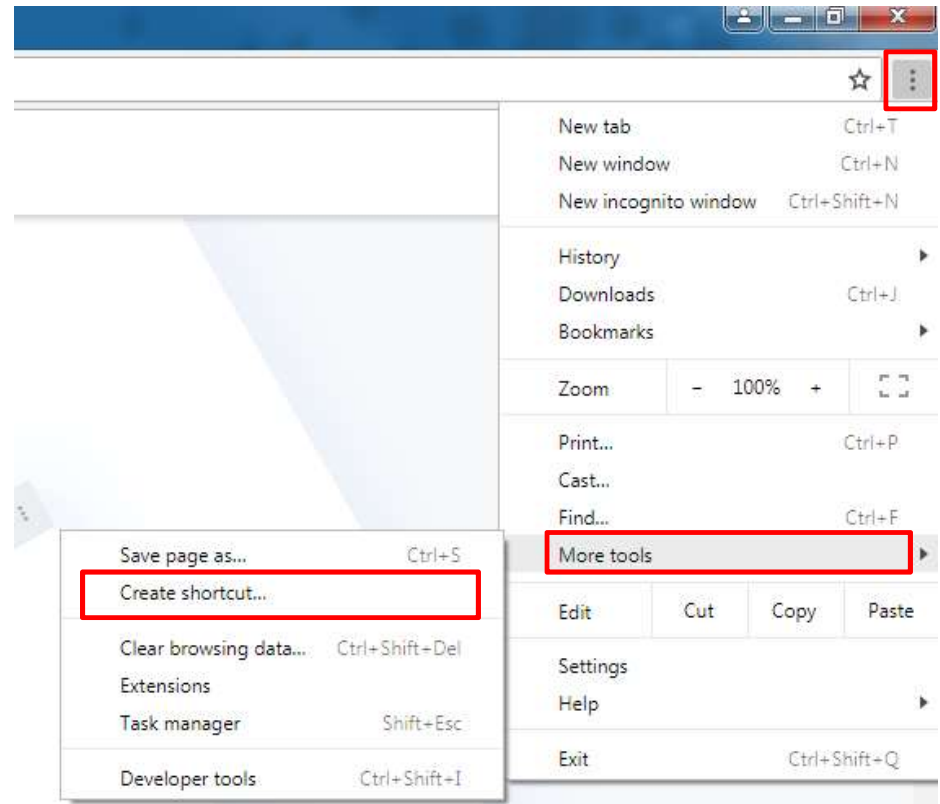
☐ Remember me

Sign in

[Forgot your password?](#)

# GOOGLE CHROME SHORTCUT

- Always use Google Chrome to launch OpenGov
- Download Google Chrome to computer
  - <https://www.google.com/chrome/>
- Add OpenGov as an icon on your computer desktop
  - Navigate to OpenGov Login and follow the screen shot







# OPENGOV OVERVIEW

- Cloud based software
  - Available on any computer with login
- Build reports using data from any system that extracts to excel
  - Data must be 'machine readable'
- Analyze financial and non-financial data through easy-to-understand, interactive graphs
- Utilize reports for public/transparent or internal use
- Create Stories to add context to data using graphs, pictures, text, videos, or embedded documents



# REPORT TRANSPARENCY

Report Icon	Report Type	Report Description
	Transparent	Reports are available to the public through Bernco.gov, the direct link is: <a href="https://bernalillocountynm.opengov.com/transparency#">https://bernalillocountynm.opengov.com/transparency#</a>
	Network	Reports are available to OpenGov Customers through the "Network" tab on the left hand corner of the screen. OpenGov customers can share and view each other's reports to compare data or view unique reports. All users with a login can utilize the Network tab.
	Organization	Reports are available to all users with an OpenGov login. If a blue report tile is on your homepage you can review the data
	Private	Reports can be created and set private to include individual users. Only users who are invited will see the report on the homepage

# OPENGOV HOMEPAGE

- Navigate between Reports, Dashboards, and Stories
  - OpenGov always defaults to Reports

The screenshot shows the OpenGov homepage interface. On the left is a vertical sidebar with icons for NETWORK, REPORTS (highlighted), DATA, PORTAL, STORIES, and SETTINGS. The main content area is titled 'Reporting' and has tabs for 'Reports' (selected) and 'Dashboards'. Below the tabs is a search bar labeled 'SEARCH: Search for reports'. The main area displays three report tiles: '01 Budget vs Actuals' (a bar chart), '02 Position Counts' (a data table), and '03 Tax Dollars at Work' (a pie chart). Each tile includes a title, an update date, and a small OpenGov logo. Annotations with arrows point to the 'REPORTS' icon in the sidebar, the 'Dashboards' tab, and the report tiles.

Reports will always be defaulted

Click here to open Dashboards

Click here to open Stories

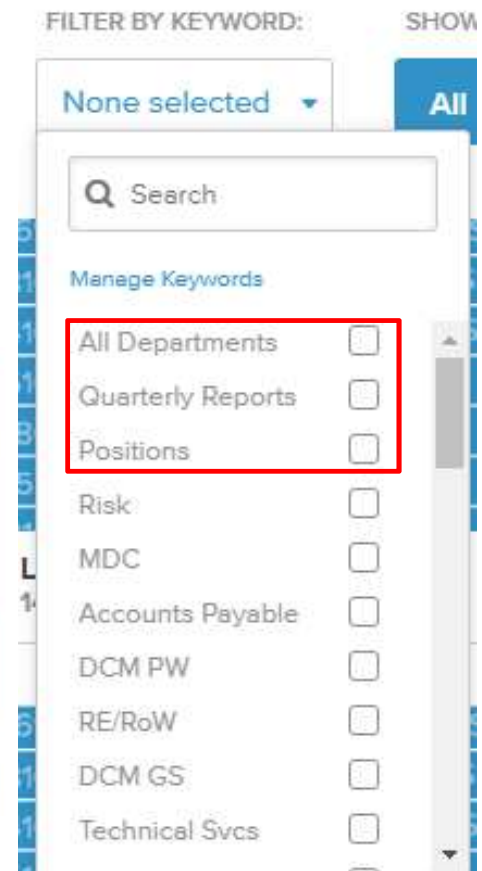
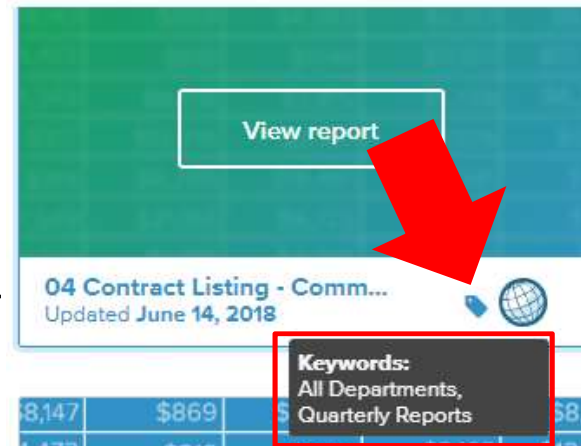
Each blue tile is a Report

	\$8,147	\$869	\$4,263	\$2,167	\$8,416
4,472	\$816	\$1,144	\$3,162	\$12,516	\$8,416
1,543	\$8,416	\$2,815	\$1,729	\$6,286	\$2,815
\$517	\$12,516	\$2,471	\$329	\$1,941	\$2,471
\$319	\$6,286	\$16,461	\$7,281	\$1,549	\$21,153
1,549	\$21,153	\$6,723	\$1,941	\$2,471	\$1,549
\$517	\$12,516	\$2,471	\$329	\$1,941	\$2,471

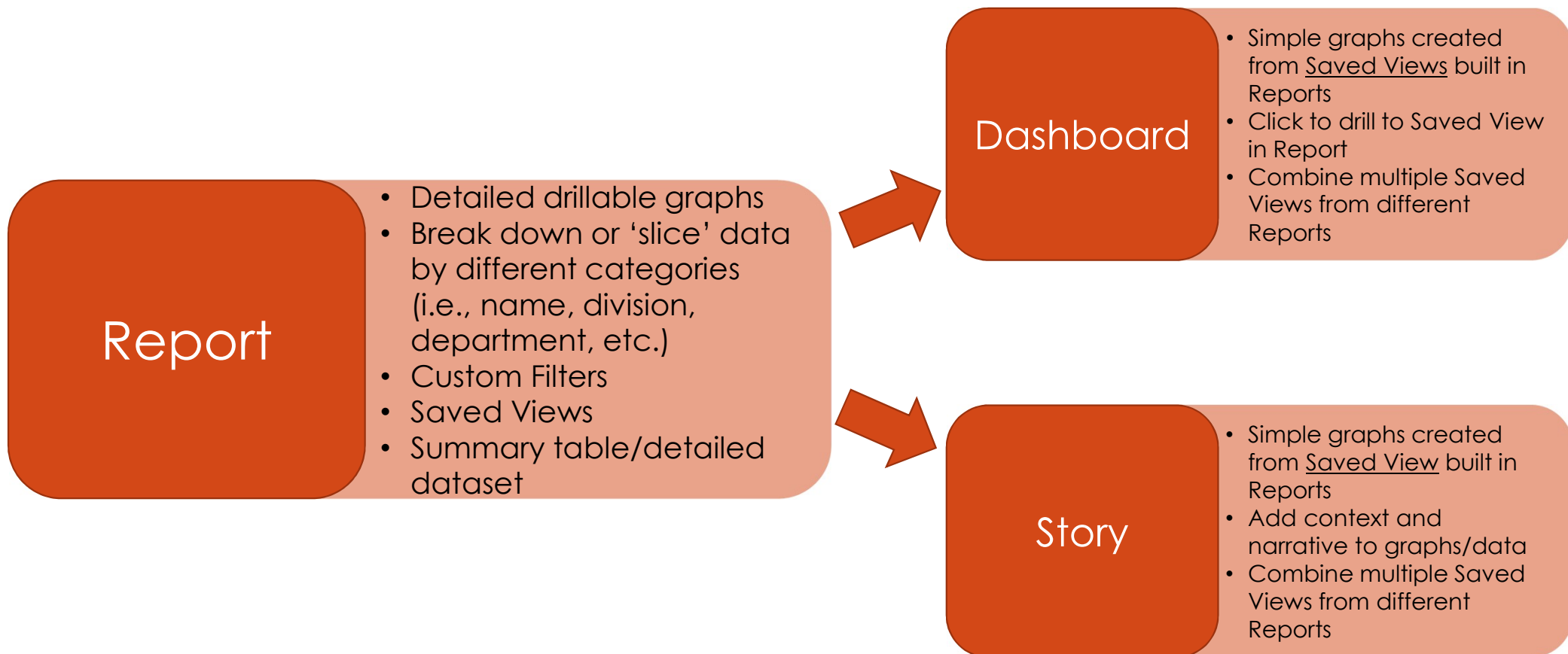


# OPENGOV HOMEPAGE CONT.

- Customize homepage to show frequently used reports by setting Filters by Keyword
- Click the checkboxes that apply to reports you want to see based on job duties, interests, department needs, etc.
- OpenGov remembers selection after you log out

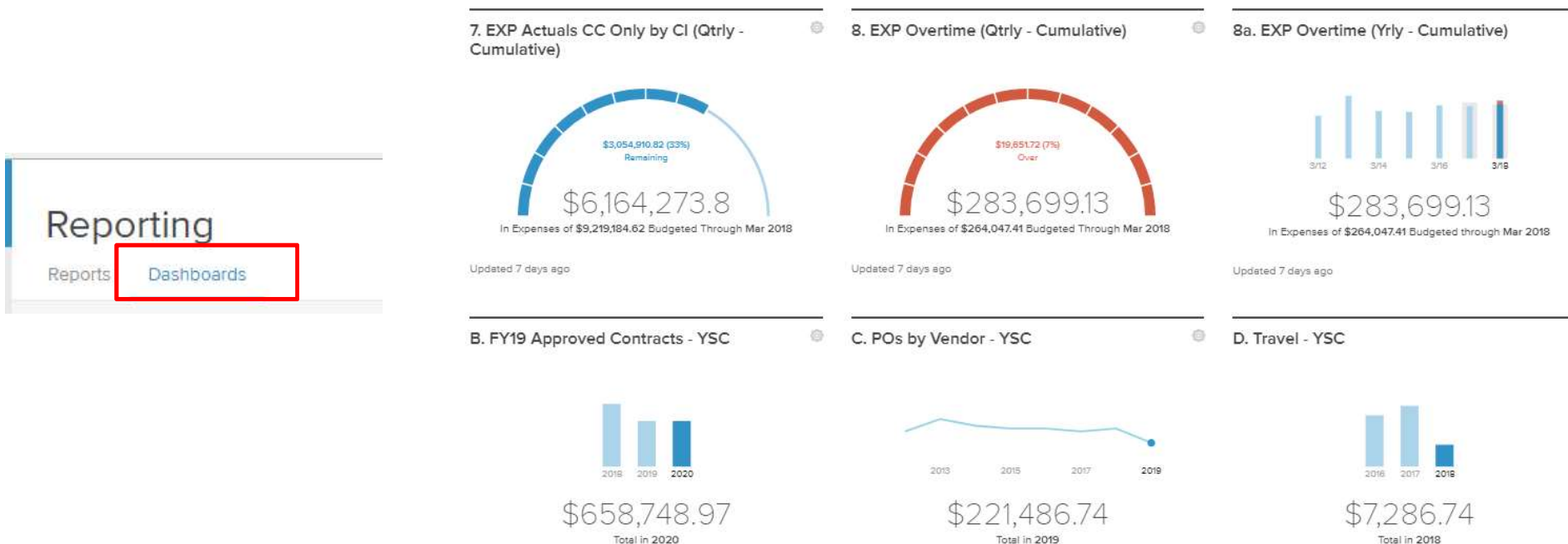


# OPENGOV FUNCTIONALITY



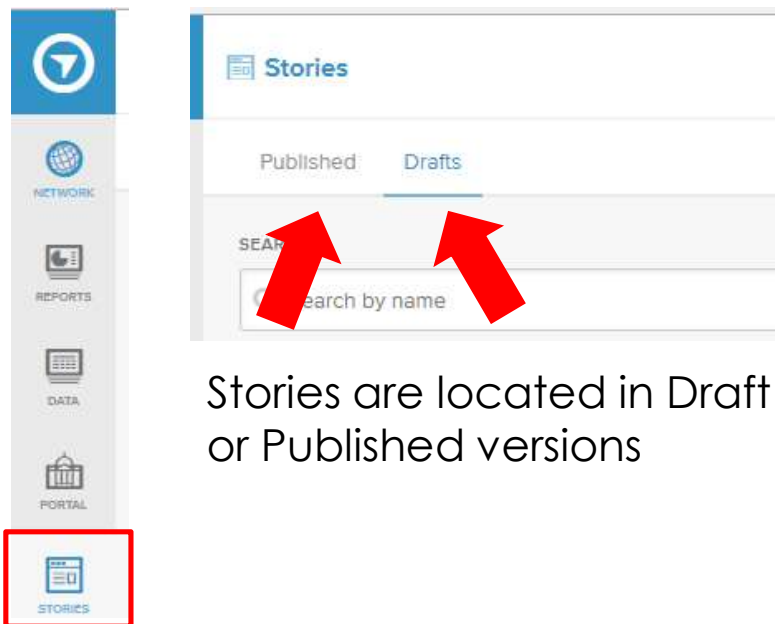
# DASHBOARDS

- High level, at-a-glance view of report data
- Combines data from any report in one place
- Click on graph to get to report (detail information)

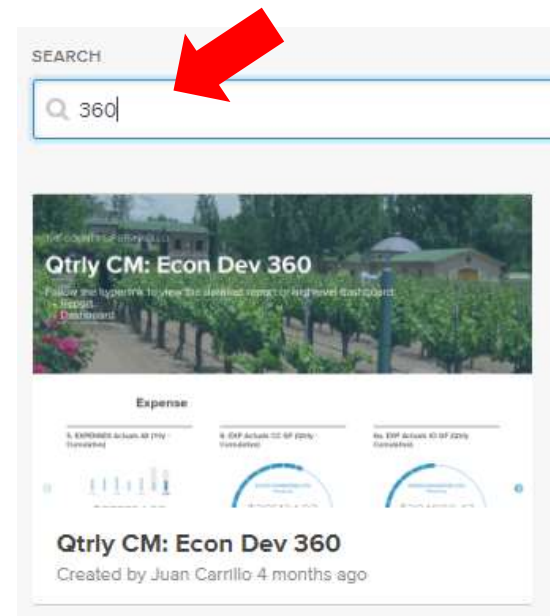


# STORIES

- Add content and narrative to graphs/data
- Stories can be transparent to the public or internal, send link to share
- Combines data from any report in one place



Stories are located in Draft or Published versions



Search Stories by key word or business area

## Expense

## Revenue

13

### 6. EXP Actuals CC GF (Qtrly - Cumulative)



### 4. REV by CI (Qtrly - Cumulative)



### Economic Development- Expenses

File Edit View Insert Format Tools Add-ons Help Last edit was made 6 hours ago by Bernco Bernie



SHARE

Sign in



### Expenses

#### 6. EXP Actuals - General Fund: Click on [link](#) to answer the questions below

Quarter	Budget Questions	Department Response
FY18		
Quarter 4		

# WHAT'S THE CONTRACT LISTING?

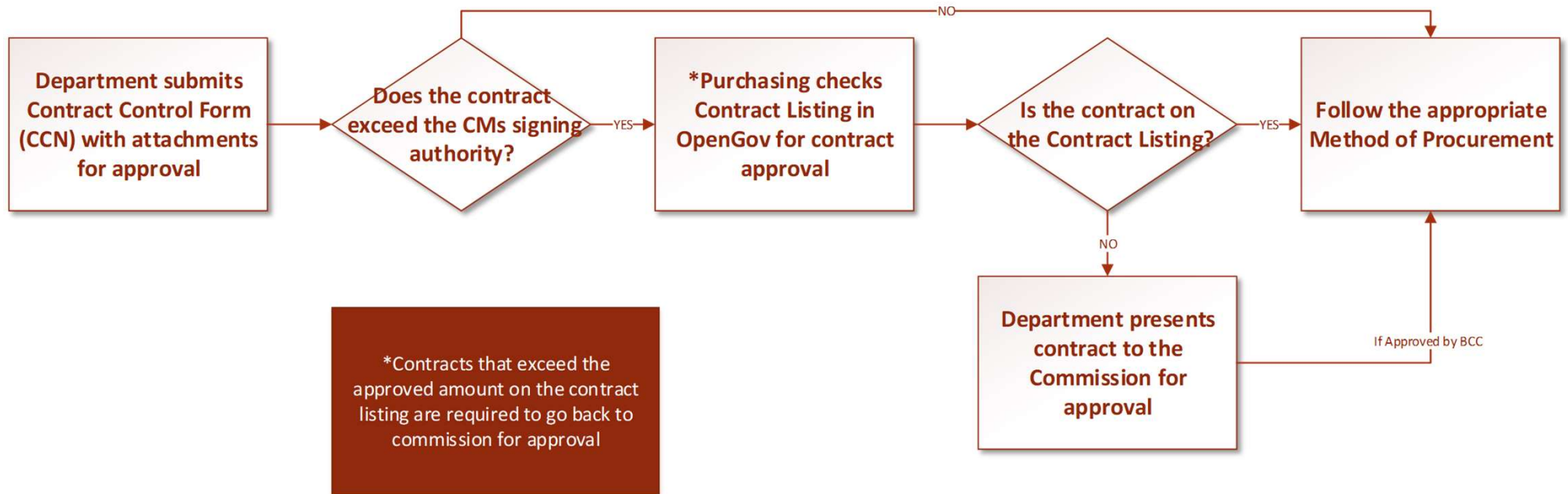
- Planned contracts submitted by each department per fiscal year
  - Submitted for budgetary purposes and assist departments with contracts
  - Created to expedite the renew process, executing 4 year contracts rather than 1 year contracts
- Budget reviews contract listing and allocates funding for next fiscal year based on budget availability and department needs
  - Funding may not be allocated for all contracts
  - It is the department's responsibility to plan for and absorb any negotiated escalators
  - If the contract is submitted with TBD, it will not get approved – future contracts cannot be submitted for approval
  - Vendor names may change during formal solicitation



## WHAT'S THE CONTRACT LISTING? CONT.

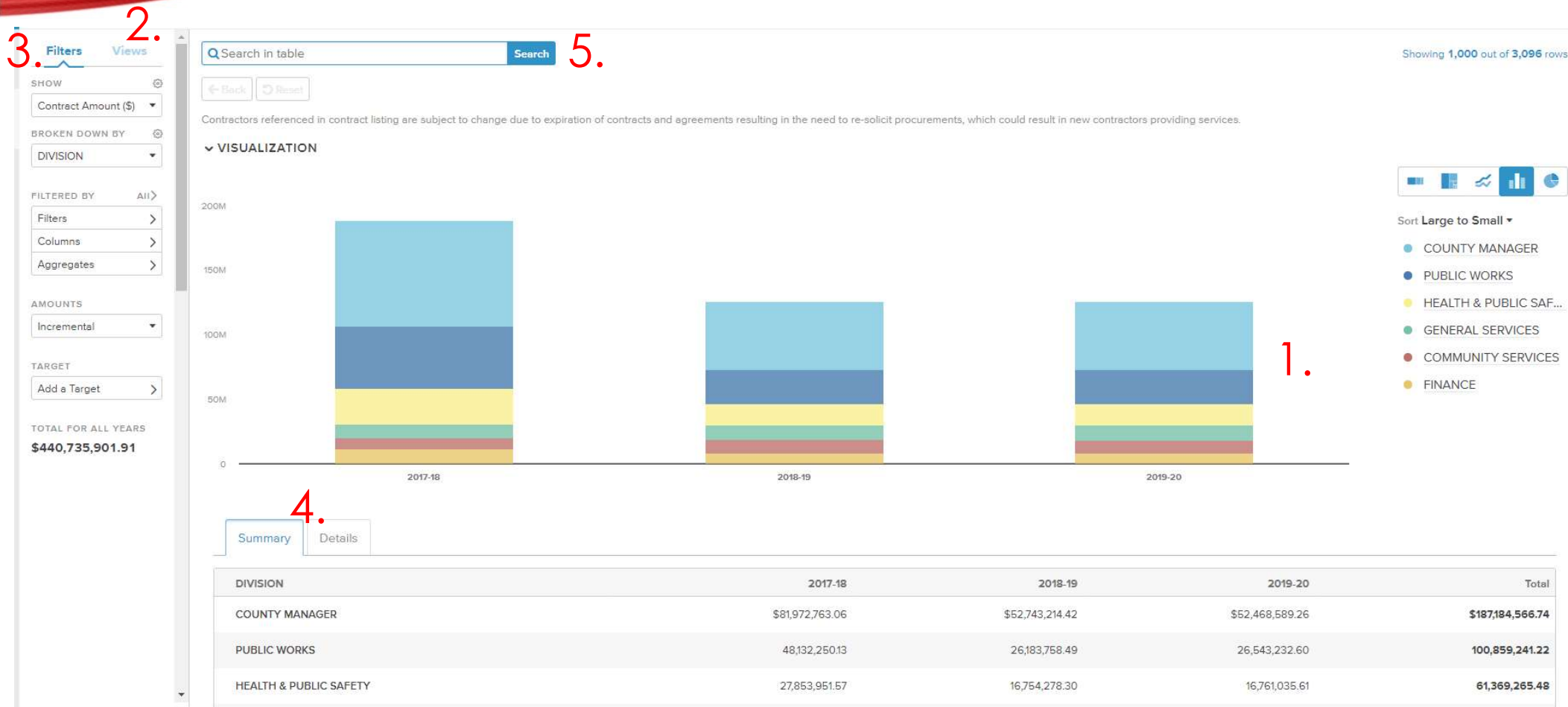
- Contracts presented to and approved by Commission
  - Motion authorizes CM to execute all contracts on behalf of the BCC
- Compiled by Budget 2x per year
  - Budget Approval
  - September
- Contract Listing **will not** include unplanned contracts that happen throughout the fiscal year
  - Contracts presented separately throughout the year will not appear on the contract listing, only contracts approved by Commission during Budget Approval & Sept Adjustments
- Encourage departments to present contracts to commission prior to contract listing, get approvals up front, shows in contract database

# WHEN TO USE THE CONTRACT LISTING?



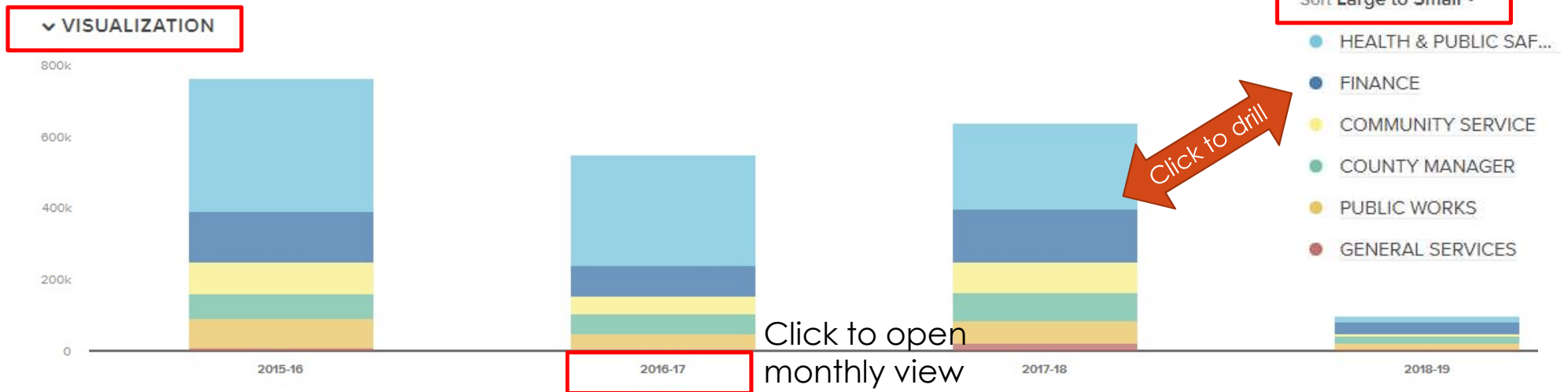
# REPORTS - NAVIGATION

1. Graph: drill to data by clicking on the graph or legend
2. Saved Views: prebuilt views for frequently asked questions or common searches
3. Filter Panel: apply custom filters such as, date ranges, greater than/less than, key words, include/exclude data
4. Data Table: view summary data by Broken Down By selection or line item detail (i.e., spreadsheet view)
5. Search Bar: search for any term throughout the entire dataset



# GRAPH

- Click on legend or graph to drill
  - Drill to monthly view by clicking on fiscal year
- Switch between graph types
  - Pie chart, bar graph, line graph, treemap, horizontal stacked bar graph
- Change Sort Order
- Open and close graph visualization to view data table

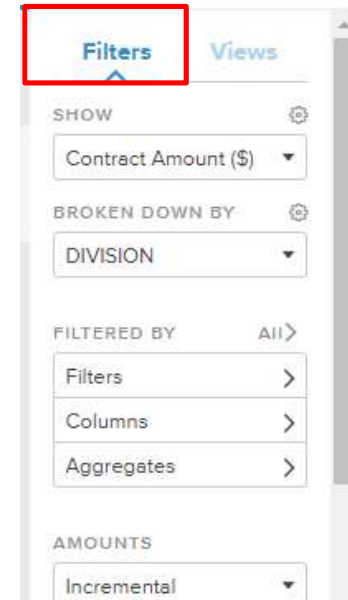


# REPORTS - NAVIGATION

Saved Views: pre-filtered views of data/graph, usually by department



Filters: customize data/graph to view specific information



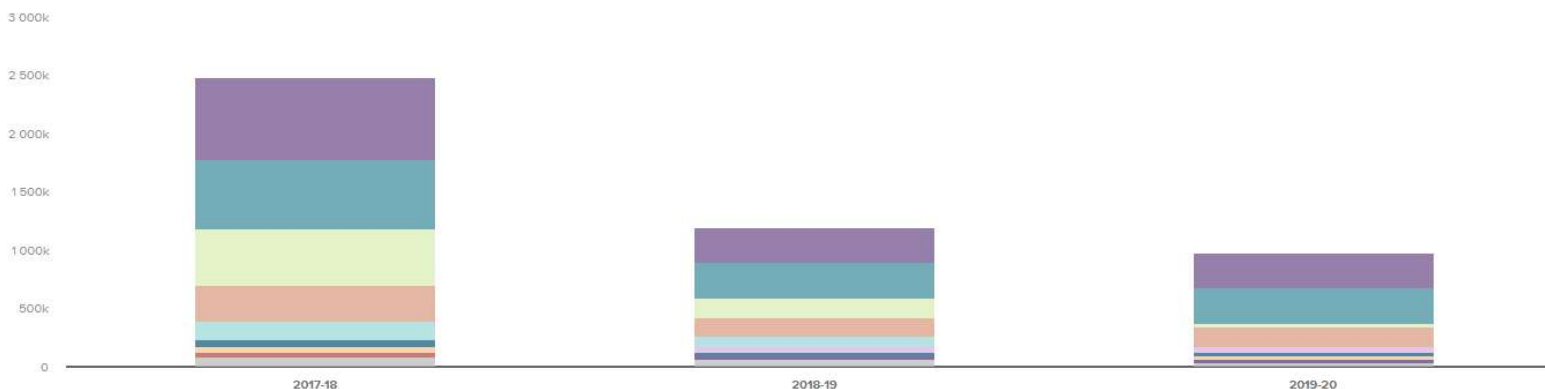


# REPORTS – SAVED VIEWS

- Created by report administrators
- List of common or favorite views, like a bookmark
  - Good starting point before you apply filters
  - Most reports have saved views by division or dept
- Example: [Contract Listing - Assessor](#)

Contractors referenced in contract listing are subject to change due to expiration of contracts and agreements resulting in the need to re-solicit procurements, which could result in new contractors providing services.

## VISUALIZATION



Filters

Views

B. FY19 Approved Contracts - Assessor

Sort Large to Small

PICTOMETRY INTERN...

TYLER TECHNOLOGI...

ESRI INC. (ENVIRON...

THE MASTERS TOUC...

ROBLES RAE & ANA...

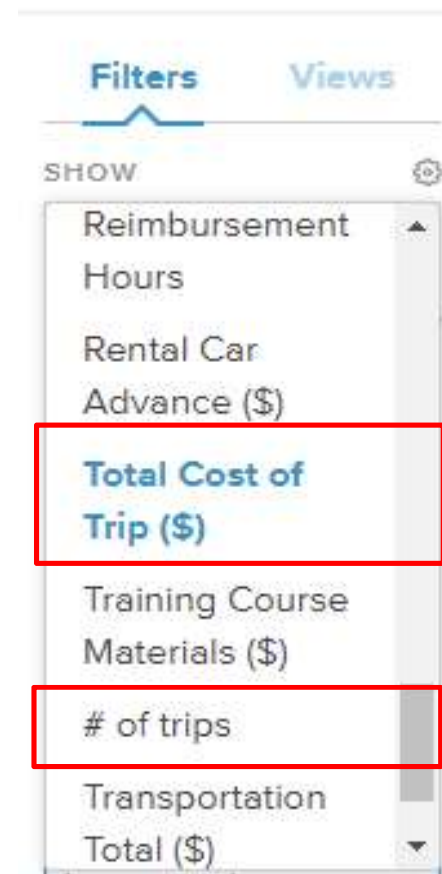
RICOH USA, INC.

SUPREME MAINTENAN...

COSTAR REALTY INF...

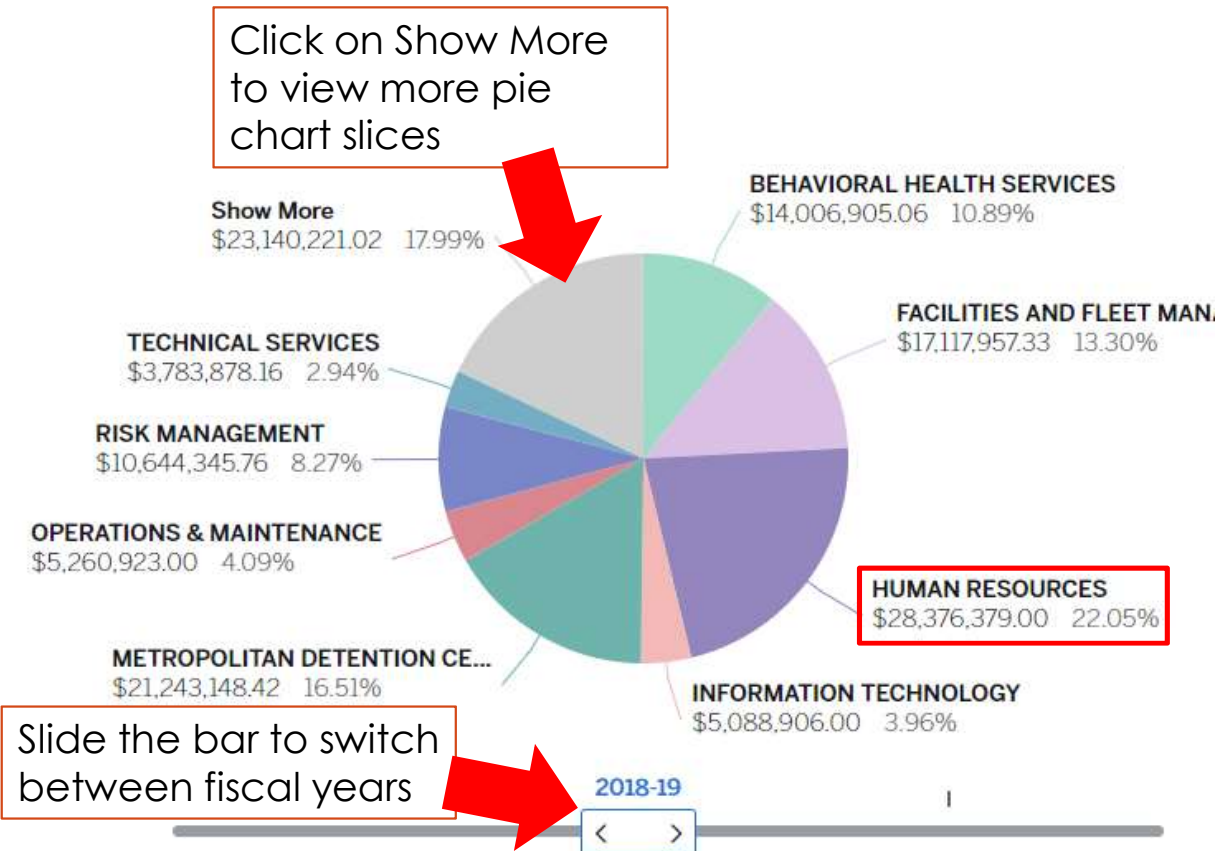
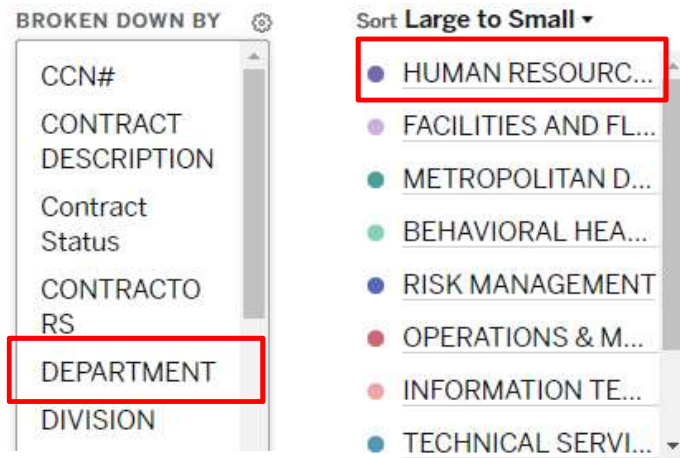
# REPORTS – SHOW

- Select numerical column to sum/total data
- Totals can include counts or dollar amounts
  - # of trips
  - Total cost of trip (\$)
  - Airfare (\$)



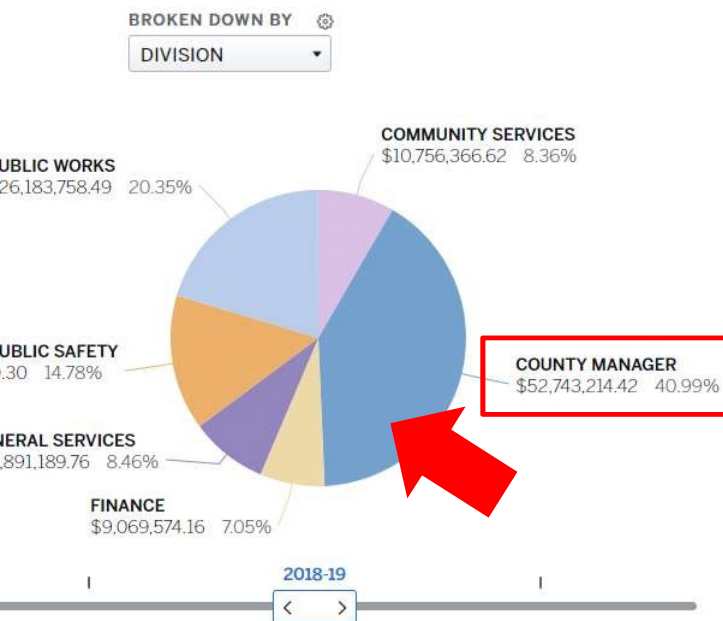
# REPORTS – BROKEN DOWN BY

- 'Slice' data by categories
  - Department
  - Division
  - Fund

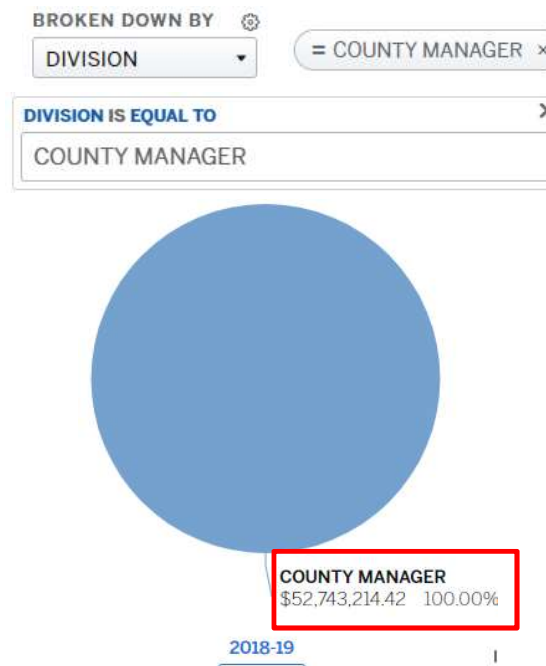


# REPORTS – BROKEN DOWN BY CONT.

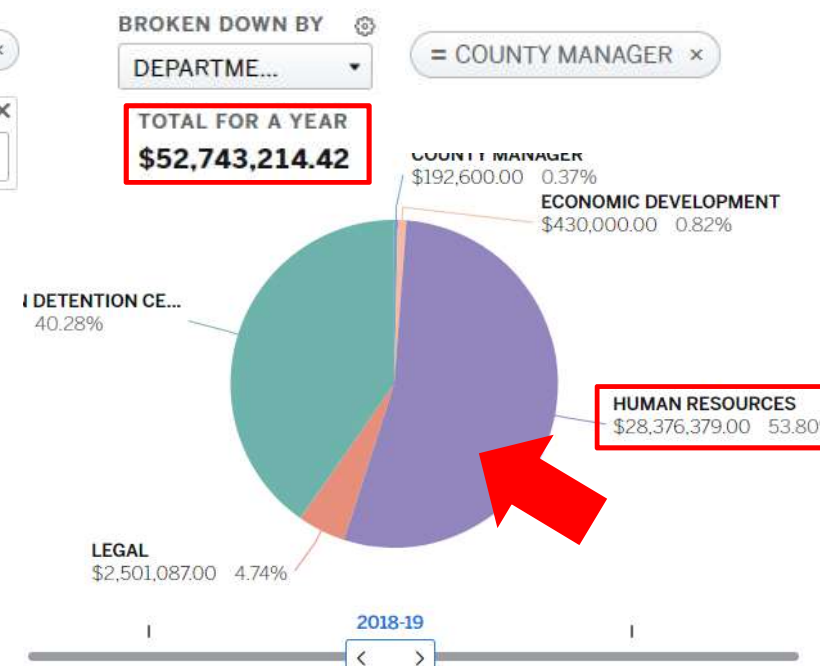
Click on pie slice to drill into a single division – **County Manger**



You are only looking at costs associated with **County Manager Division**



Change Broken Down By to see the pie slice by Department – click **Human Resources**



# REPORTS – BROKEN DOWN BY CONT.

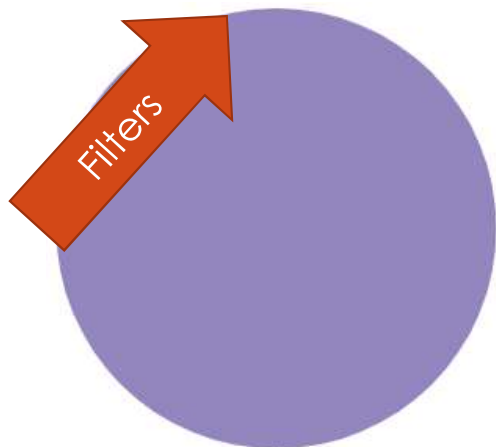
You are only looking  
at **Human Resources**

BROKEN DOWN BY

DEPARTME...

= COUNTY MANAGER x

= HUMAN RESOURCES x



**HUMAN RESOURCES**

\$28,376,379.00 100.00%

Slice the pie by changing Broken Down By  
**Contractors**

BROKEN DOWN BY

CONTRAC...

= COUNTY MANAGER x

= HUMAN RESOURCES x

**TOTAL FOR A YEAR**

**\$28,376,379.00**

STATE OF NEW MEXICO- DEPA...  
\$200,000.00 0.70%

Show More  
\$377,340.00 1.33%

BLUE CROSS BLUE SHIELD  
\$5,630,000.00 19.84%

CONCENTRA MEDICAL CENTE...  
\$225,000.00 0.79%

EXPRESS SCRIPTS PRESCRIP...  
\$3,500,000.00 12.33%

GALLAGHER BENEFITS SERVIC...  
\$105,000.00 0.37%

INVESTIGATIVE SERVICES  
\$120,000.00 0.42%

KANEKO AND KRAMMER CORP  
\$120,000.00 0.42%

PRESBYTERIAN HEALTH  
\$18,099,039.00 63.78%

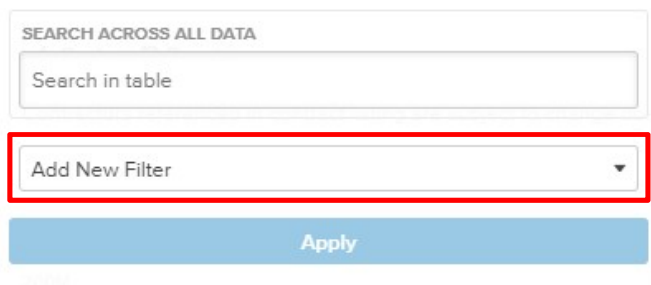
2018-19

< >



# REPORTS – FILTER BY

- Filtered By: add new filter to analyze data



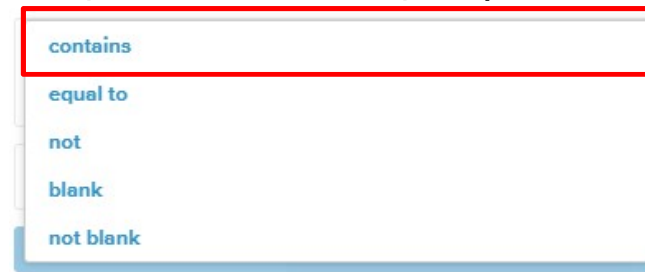
SEARCH ACROSS ALL DATA

Search in table

Add New Filter

Apply

- Select type of filter (i.e., contains, equal to, not equal)



contains

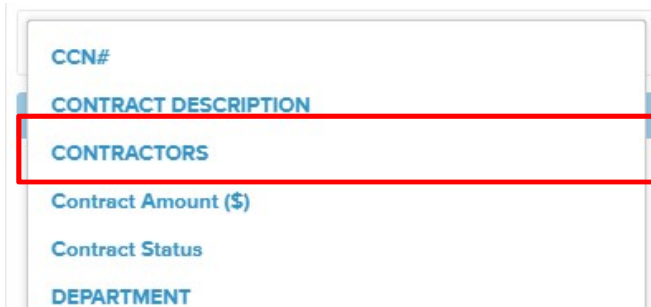
equal to

not

blank

not blank

- Select column to apply filter



CCN#

CONTRACT DESCRIPTION

CONTRACTORS

Contract Amount (\$)

Contract Status

DEPARTMENT

- Enter key word to filter by



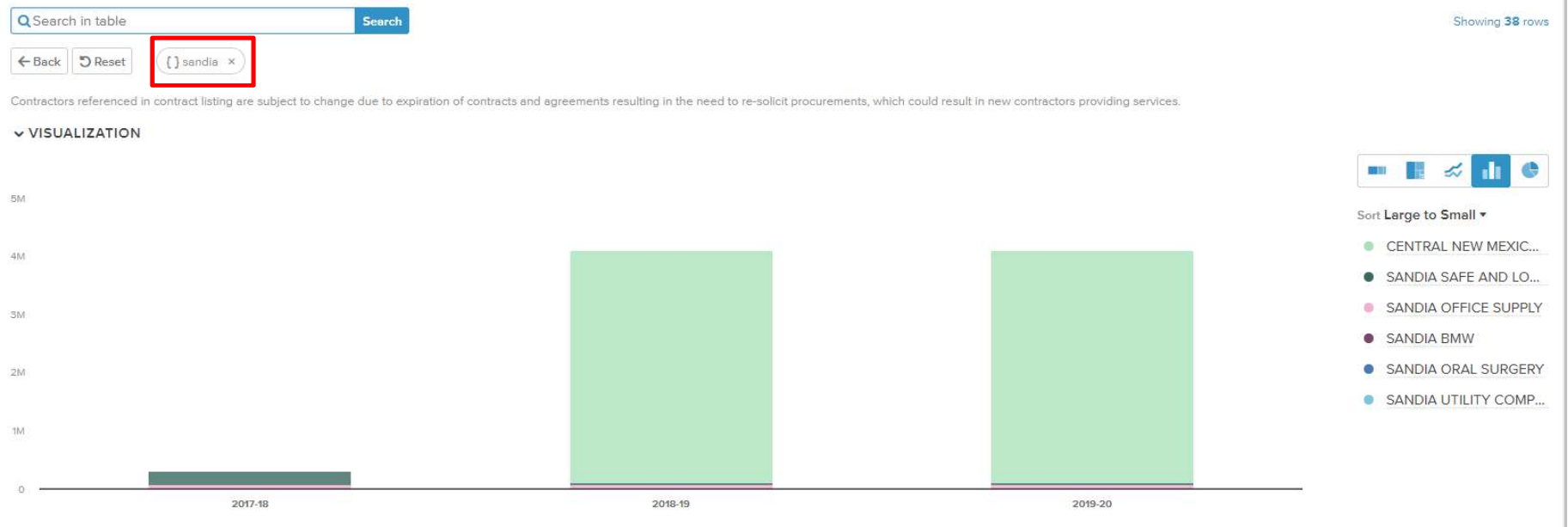
CONTRACTORS CONTAINS

sandia



# REPORTS – FILTER BY CONT.

- Report shows all Contractors containing 'sandia'
- Any filter that's applied will show up under the search bar



# SUMMARY TABLE

- Shows data by the selection from the Broken Down By
  - Adds data by incremental and cumulative totals
  - Columns are shown by month or fiscal year
  - Click on titles to drill to data

DIVISION	2017-18	2018-19	2019-20	Total
COUNTY MANAGER	\$81,972,763.06	\$52,743,214.42	\$52,468,589.26	<b>\$187,184,566.74</b>
PUBLIC WORKS	48,132,250.13	26,183,758.49	26,543,232.60	<b>100,859,241.22</b>
HEALTH & PUBLIC SAFETY	27,853,951.57	19,018,560.30	16,761,035.61	<b>63,633,547.48</b>
GENERAL SERVICES	10,296,266.00	10,891,189.76	11,820,950.00	<b>33,008,405.76</b>
COMMUNITY SERVICES	9,040,879.35	10,756,366.62	10,135,059.42	<b>29,932,305.39</b>
FINANCE	11,666,233.31	9,069,574.16	8,255,309.86	<b>28,991,117.33</b>
<b>Total</b>	<b>\$188,962,343.42</b>	<b>\$128,662,663.75</b>	<b>\$125,984,176.75</b>	<b>\$443,609,183.92</b>

Adds data across all fiscal years for a single division

Adds data across all fiscal years and divisions

Adds data for all divisions per fiscal year

Click on a division to drill

# DETAIL TABLE

- Shows line item information for dataset, 'spreadsheet view'
  - Add filters to any columns by clicking on arrow
  - Filters will change based on date, text, or numerical data within the column
  - Click on a single cell in the table to search

## Text Search

DEPARTMENT

Q fleet

Sort Ascending

Sort Descending

Hide Column

Clear Okay

FACILITIES AND FLEET MANAGEMENT

## Numerical Search

Contract Amount (\$)

≥ 100000

≤ To

Sort Ascending

Sort Descending

Hide Column

Clear Okay

57,881.25

## Date Search

Date Effective

≥ 10/17/2018

2010-2019

2009 2010 2011 2012

2013 2014 2015 2016

2017 2018 2019 2020

close

Clear Okay

## Single Cell Search

SANDIA OFFICE SUPPLY

PITNEY BOWES

LEASING OF POSTAGE

3,700.00 2020 07/01

8,70

3,52

Search for SANDIA OFFICE SUPPLY

At Most 3,700.00

Equal to 3,700.00

At Least 3,700.00

07/01/2019

EXISTING

At or Before 07/01/2019

On 07/01/2019

At or After 07/01/2019

# SEARCH BAR

- Enter text, date, or number to search the entire dataset, searches all columns

×
Search

← Back
↺ Reset
{ } building ×

DEPARTMENT ▾	SECTION ▾	FUND CENT ▾	GL ACCOUI ▾	CONTRACTORS ▾	CONTRACT DESCRIPTION ▾
FACILITIES AND FLEET MANAGEMENT		510103	531200	LOWES	BUILDING SUPPLIES AND MATERIALS
FACILITIES AND FLEET MANAGEMENT		510103	531200	RAKS BUILDING SUPPLY INC.	BUILDING MATERIALS AND SUPPLIES
FACILITIES AND FLEET MANAGEMENT		510103	531200	SECURITY AND ACCESS	BUILDING MAINTENANCE AND REPAIRS - SECURITY ALA...
FACILITIES AND FLEET MANAGEMENT		510103	531200	SIMPLEX GRINNELL	BUILDING MAINTENANCE AND REPAIRS - FIRE ALARM A...
FACILITIES AND FLEET MANAGEMENT		510103	531200	SUN STATE	BUILDING MAINTENANE & REPAIRS - PLUMBING
FACILITIES AND FLEET MANAGEMENT		510103	531200	THYSSENKRUPP	BUILDING MAINTENANCE AND REPAIRS - ELEVATORS
FACILITIES AND FLEET MANAGEMENT		510103	531200	TLC PLUMBING	BUILDING MAINTENANE & REPAIRS - PLUMBING AND HV...
FACILITIES AND FLEET MANAGEMENT		510103	531200	VIKING II INC.	BUILDING MATERIALS AND SUPPLIES

# FUTURE REPORTS

- Do you have any reporting needs? What questions do you get asked the most?
  - Is there reports/data you review/share each month?
  - Do you have data you would like to share with the public?
  - Is there internal tracking you would like to share with your department at monthly staff meetings?
  - Do you have data in spreadsheets or systems?

# CONTACT INFORMATION

Maria Zuniga	<a href="mailto:mzuniga@bernco.gov">mzuniga@bernco.gov</a>	468-1684
Angela Montano	<a href="mailto:Amontano@Bernco.gov">Amontano@Bernco.gov</a>	468-7005
Veronica Schornack	<a href="mailto:vschornack@Bernco.gov">vschornack@Bernco.gov</a>	468-7066